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Buying Products Directly From Farmers and Valuing Agriculture: Behavior and Attitudes of New Hampshire Food Shoppers

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Buying Products Directly From Farmers and Valuing Agriculture: Behavior and Attitudes of New Hampshire Food Shoppers

Summary

What percentage of New Hampshire food shoppers buy products direct from New Hampshire farmers? Who are these shoppers and why do they buy from local farms? How might farmers increase both the number of shoppers and their purchases? What do New Hampshire food shoppers think about farmland protection?

Many farms in New Hampshire are reconsidering their business strategies due to adverse effects from local development, foreign agricultural imports, food industry consolidations and other factors beyond a farmer's ability to influence or control. For some New Hampshire farms, this means taking a new look at opportunities for marketing their products direct to New Hampshire households. This, in turn, has created a need for information that helps farmers better target and communicate with potential customers and provide those customers with the products and services they want.

To address this need, the New Hampshire Food Shoppers Study was undertaken to:

- support farmer efforts to increase the profitability of their businesses through direct marketing to New Hampshire food shoppers.
- understand the attitudes of New Hampshire food shoppers towards local farm products, farm-to-consumer direct markets, farm viability and farmland protection.

Data was collected from a telephone survey of New Hampshire food shoppers conducted in September 2002 and analyzed to:

- determine the behavior and attitudes of food shoppers who buy products directly from farmers at farm stands, U-Pick farms, farmers' markets, and community-supported agriculture (CSA) farms during the summer months.
- assess food-shoppers' attitudes toward farms and loss of farmland.

- develop marketing recommendations for consideration by farmers to increase their direct sales to consumers.

Further studies will closely examine the profile of food shoppers and users of each market. These results will be forthcoming in a follow-up report.

Characteristics of the Survey Sample

The study collected information from 435 New Hampshire food shoppers. Seventy-five percent were female, typically a household's principal food shopper. The county of residence of those surveyed was similar to the geographic distribution of population in the state.

Behavior and Attitudes Toward Buying Directly from Farmers

- Sixty percent of the respondents purchased products from a farm stand during the summer. Twenty-seven percent said they bought from a U-pick farm and 20 percent from a farmers' market.
- "Freshness of products" was by far the first and most important reason for buying products in all three markets.
- Besides freshness, customers of farm stands and farmers' markets cited "convenience" and "help local farmer" as important to their buying decision. "Atmosphere" was important to those buying at U-pick farms.
- Farm stand and farmers' market shoppers tend to buy from farmers close to home. Seventy-three percent of farm stand customers and 67 percent of farmers' market customers traveled five miles or fewer to the place shopped most frequently.
- Shoppers travel farther, though less frequently, to U-pick farms. Only forty percent traveled up to five miles to buy from a U-pick farm.
- Sweet corn and tomatoes were the most frequently mentioned products purchased at farm stands and farmers' markets, followed by a general category of "other vegetables."
- Strawberries and blueberries were the two principal products bought at U-pick farms in the summer. Because the survey was conducted in September and asked about shopping behavior during the three previous months (June –August) fall apple, pumpkin and other product sales were not mentioned.
- Over two-thirds of customers were satisfied with the facilities and services offered at each market. Fourteen percent of farm stand customers would like to see additional or related products offered for sale, and 11 percent of U-pick customers requested restroom facilities.
- "Out of the way or inconvenient" and "don't know any" were cited as the most important reasons why shoppers did not buy directly from farmers.
- New Hampshire food shoppers are mixed on the importance of place of origin to their purchase decisions. Fifty-four percent said that place of origin did not affect

their decision to buy fresh produce and processed food; forty-three percent said it did.

- At the same time, food shoppers are receptive to purchasing products from New Hampshire over those from other places. Thirty-nine percent of those surveyed said they would definitely buy a New Hampshire product if it was identified by labeling and another 56 percent said they probably would do so.
- Sixty-two percent of respondents said that they would be willing to pay more for produce and food products labeled from New Hampshire.
- Shoppers are not in agreement about what “locally grown” means. Thirty-five percent said the term meant grown in New Hampshire. Another 29 percent thought it referred to products from their region of the state, and another 12 percent said it meant items grown within five miles of their home. On the other hand only 19 percent described locally grown as from New England or from the Northeast (four percent).
- Ninety-four percent of respondents agreed somewhat or strongly that “consumers should have more locally-grown fruits and vegetables available to them.”
- Seventy-eight percent agreed somewhat or strongly that “consumers can influence what fruits and vegetables are grown locally.”
- Ninety percent of respondents agreed somewhat or strongly cafeterias in schools, hospitals and public institutions should serve food grown by local farmers.

Attitudes Toward Farms and Loss of Farmland

- Ninety-one percent of those surveyed disagreed strongly or somewhat with the statement that “keeping farms viable on New Hampshire is not important.”
- The connection between buying local and strong farms was clearly recognized by respondents. Ninety-eight percent agreed with the statement that “buying local produce is an effective way to keep New Hampshire farms viable.”
- Respondents acknowledge that laws have an important role to play in protecting farmland from development. Ninety percent agreed strongly or somewhat with the statement that “laws should try to protect farmland from urban development.”
- Eighty-two percent agreed with the idea that a portion of their property tax be used to preserve open space in their town.

Marketing Implications from Survey Responses

A preliminary assessment of survey responses offers the following implications for farmers with respect to key elements of their business marketing strategies: product, price, promotion and place.

Product Strategies

- "Farm fresh" has real meaning and value for New Hampshire food shoppers. Freshness was the overriding reason for buying fruits and vegetables at farm stands, farmers' markets and U-Pick farms. Freshness sets farm businesses apart from supermarket produce sections. Farmers selling through retail outlets need to ensure and promote product freshness.
- Sweet corn and tomatoes stand out as the most desired products sought by farm stand and farmers' market shoppers. They draw people to the market and lead to the purchase of other vegetables, fruits, baked goods and other products. Communication with exiting customers would aid in determining the desirability of changes to the product mix.
- The principal draw for summer U-Pick customers was farm fresh strawberries (63%) and blueberries (51%) followed by apples (21%) and raspberries (15%). Complementary products should be explored to supplement U-pick sales.

Pricing Strategies

- Although price was not noted as an important reason for shopping at farm stands and farmers' markets, 16 percent of U-Pick farm customers identified value for the money as a reason for shopping.
- High prices did not discourage respondents from shopping at any of the three markets.
- More than 60 percent of those surveyed said that they would be willing to pay more for New Hampshire grown products.

Promotion Strategies

- Convenience and the sense of helping local farmers are important considerations when creating promotional programs for farmers' markets and farm stands.
- Atmosphere and fun activities, but not necessarily special events or promotions, are key elements of promotional strategies for U-Pick farms.
- Local advertising is a key marketing resource. Farmers markets and farm stands draw over two-thirds of their customers from within five miles of their location. At 10 miles out, percentages of customers are approximately 90 percent for these two markets.
- Advertising for U-Pick farms needs wider distribution than the other two markets. Less than 40 percent of U-Pick customers come from within five miles of the farm's location, with 76 percent traveling 10 miles or fewer.
- It was not uncommon for customers of farm stands and farmers' markets to visit several stands and markets during the summer months. Farmers may want to explore joint promotion and advertising.
- New Hampshire grown products should be labeled or otherwise identified to consumers. Close to 40 percent of respondents indicated that they would definitely buy state-grown products and 56 percent said that they would probably buy them.

- Farmers should find a way to communicate to the public how their farms help preserve open space in New Hampshire. The majority of respondents indicated that protecting open space including farmland is important to them. Almost 60 percent strongly believed that laws should try to protect farmland, and 45 percent strongly supported the idea that a portion of their property tax be used to preserve open space in their town.
- Farmers should work to maintain and nurture food shoppers' favorable attitudes toward farming. More than 60 percent of respondents believed that it is important to keep New Hampshire farms viable and 77 percent had the strong belief that buying local produce is an effective way to keep farms in the state viable.

<u>Place Strategies</u>

- Market location is important. Being perceived as "inconvenient" or "out of the way" is a major barrier to a shopper's decision to buy from a farm or farmers market. This can be overcome by a mix of strategies: advertising, good directions and signage, consistent hours of operation, making the trip worthwhile to the customer, etc.
- Likewise, farmers need to develop strategies to overcome the very significant "don't know any farm stands, farmers' markets or U-pick" barrier.
- While not shopped as frequently as farm stands, shoppers appear willing to travel a little further to a U-Pick farm. For these businesses, the farm's atmosphere, including activities, is almost as important as product freshness to maintaining and enhancing sales. The goal is to ensure value for the money from the customer's perspective.
- Since most shoppers travel a relatively short distance to farmers' markets and farm stands, locations within five miles of populated areas are most desirable. At the same time, farmers need to work much harder to make shoppers aware of their businesses.
- Farmers are likely to receive support from food shoppers if they try selling products to local public institutions. The survey results indicate that more than half of the respondents strongly support the idea that public institutions such as schools and hospitals serve locally grown food.

New Hampshire Food Buyers Survey

Background

Between 1975 and 2000, New Hampshire's population grew from 817,200 to 1,173,700. During that period, farmland decreased by 18 percent from 506,500 acres to 415,000 acres. The decline in cropland acreage has been dramatic, decreasing by 24 percent since 1974. Development has permanently removed 31,000 acres of the state's most productive farmland from agriculture (Sundquist and Stevens, 1999).

During that period, the number of fruit and vegetable farms remained largely unchanged while the average size of fruit and vegetable farms decreased. As these operations have become smaller and more diversified, many now market directly to consumers allowing these farms to retain a higher percentage of sale dollars.

Development pressure on farms and farmland is expected to continue. The New Hampshire Office of State Planning (1997) has projected a 24 percent increase in the state population in the next two decades with a 40 percent increase in the population of some parts of southern New Hampshire.

Urban sprawl and a lack of understanding of agriculture's role in limiting it will likely accelerate the decline of the state's agricultural production and employment opportunities. The non-monetary benefits that farming provides will fade. Cropland, fields, pastures, meadows and woodlots not only buffer residential and commercial development, they are also critical habitats for many species of wildlife. Trees and other natural vegetation along rivers and wetlands help prevent erosion and take up excess nutrients before they reach the water. With dwindling farm numbers, communities also lose ties to their cultural heritage and rural character.

There is widespread interest in preserving open space in New Hampshire and various strategies have been proposed and implemented to achieve that objective. Many have stressed the importance of making sure that farms remain in business so that agricultural lands are not lost to other uses.

Study Objectives

The main purpose of this study was to obtain information that could help farmers increase the profitability of their operations and improve the likelihood that they would continue farming. The focus of the study was on direct sales as many farms in New Hampshire sell directly to consumers and a good proportion of those farms are situated close to highly populated areas.

The study has three specific objectives: (1) determine the behavior and attitudes of food shoppers who buy from farm stands, U-Pick farms, farmers' markets, and community-supported agriculture (CSA) farms during the summer months; (2) assess food shoppers' attitudes toward farms and the loss of farmland; and (3) develop marketing data and recommendations for consideration by farmers marketing directly to consumers.

Procedure

Data for this study was obtained through a telephone survey of New Hampshire food shoppers. The University of New Hampshire Survey Center conducted the survey between September 8 and September 15, 2002. The survey instrument contained questions related to respondents' behavior, attitudes, and demographic characteristics. A sample of households in the state was selected through random digit dialing, a procedure that allows each household that has a telephone to have an equal chance of being selected for the sample. The household member who was the primary food shopper for the household was selected to answer the survey questions.

A total of 2335 potential respondents were contacted. Of this number, 435 or 19 percent resulted in completed interviews, 15 percent refused to participate in the study, and 66 percent of the interviews could not be completed for various reasons.

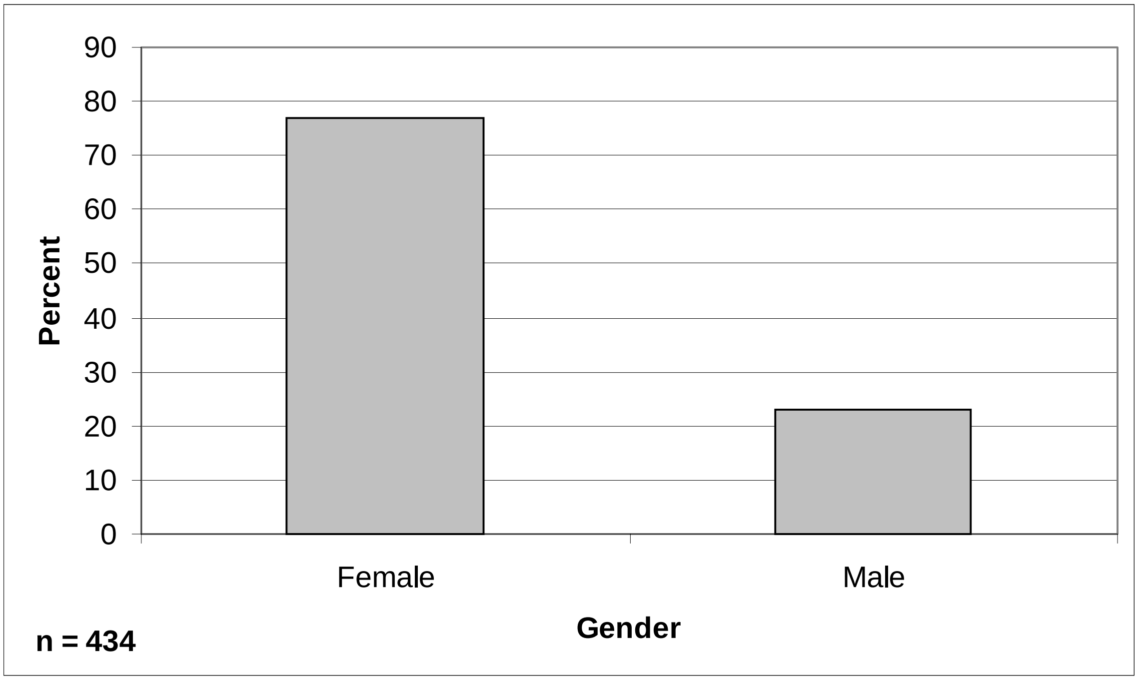
To avoid biasing the sample in favor of households that can be reached through more than one telephone number, each case was weighted inversely to its probability of being included in the sample. In addition, the data was weighted to correct for potential sampling biases due to size of household (i.e., number of persons aged 18 and over living in the household) and county of residence. The weights used were based on 2000 U.S. Census data.

Survey Responses

The following pages contain tables and summaries of the survey responses for selected questions. The information is grouped into three categories: **Demographics, Behavior and Attitudes Toward Buying Directly from Farmers and Attitudes Toward Farms and Loss of Farmland**.

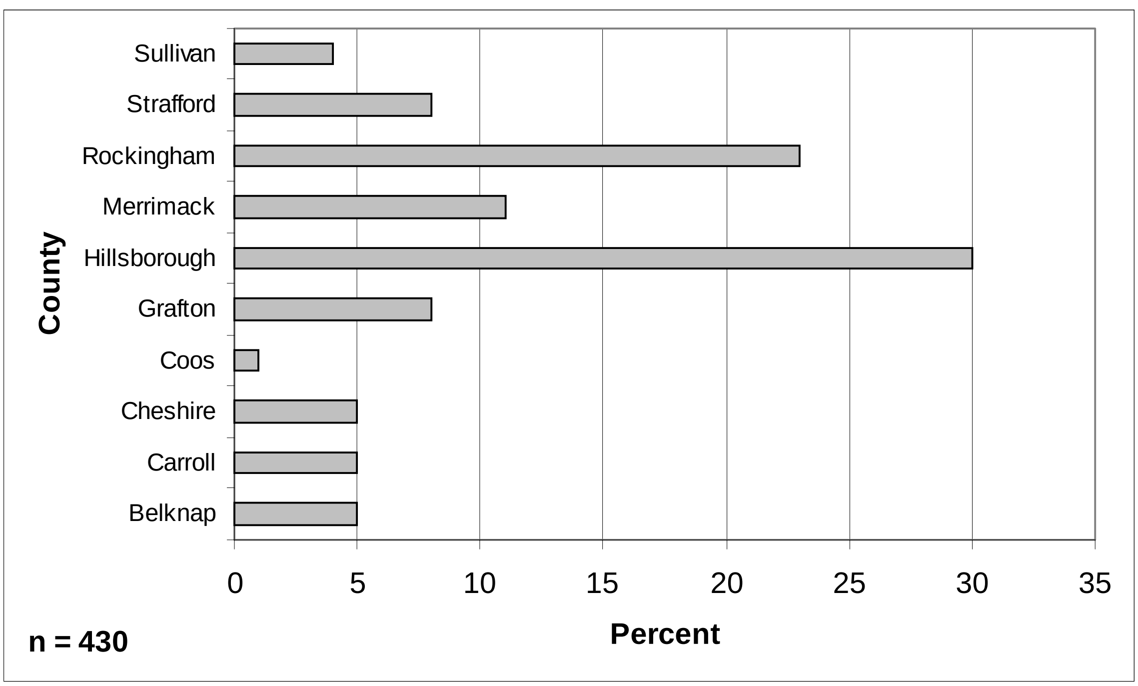
Demographics

Figure 1. Gender of Respondents



More than three-fourths of the respondents are female. Adult females in a household generally do the shopping for food products.

Figure 2. County of Residence



The sample distribution with regard to the county of residence followed closely the population distribution in the state.

Figure 3. Level of Education

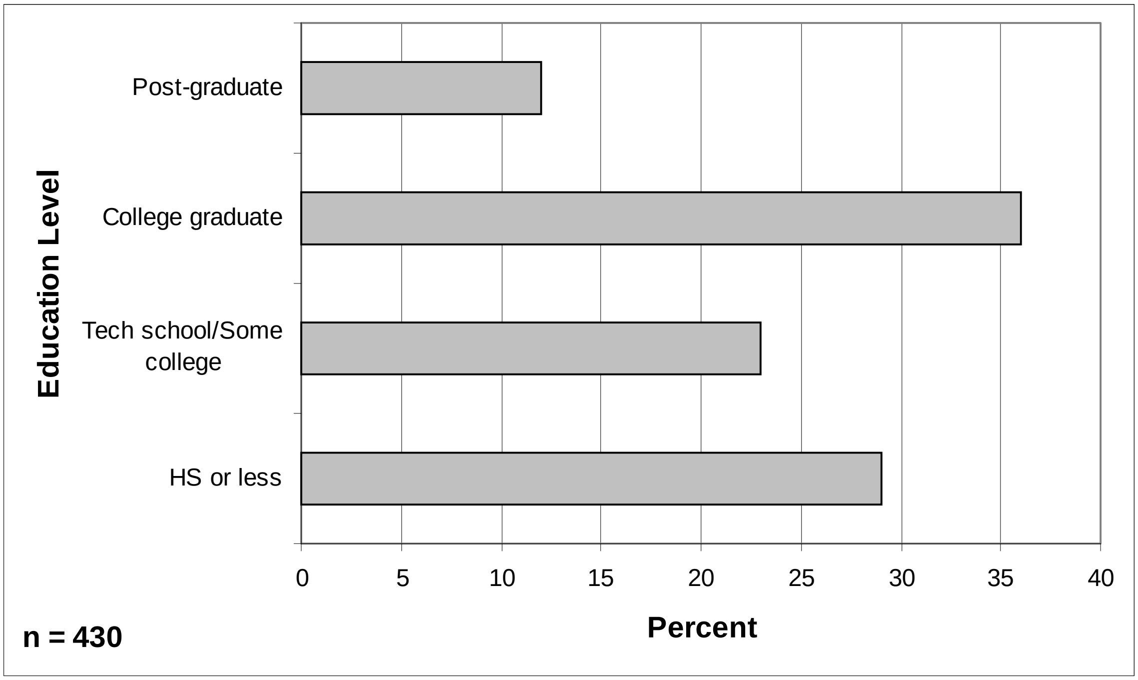


Figure 4. Annual Household Income

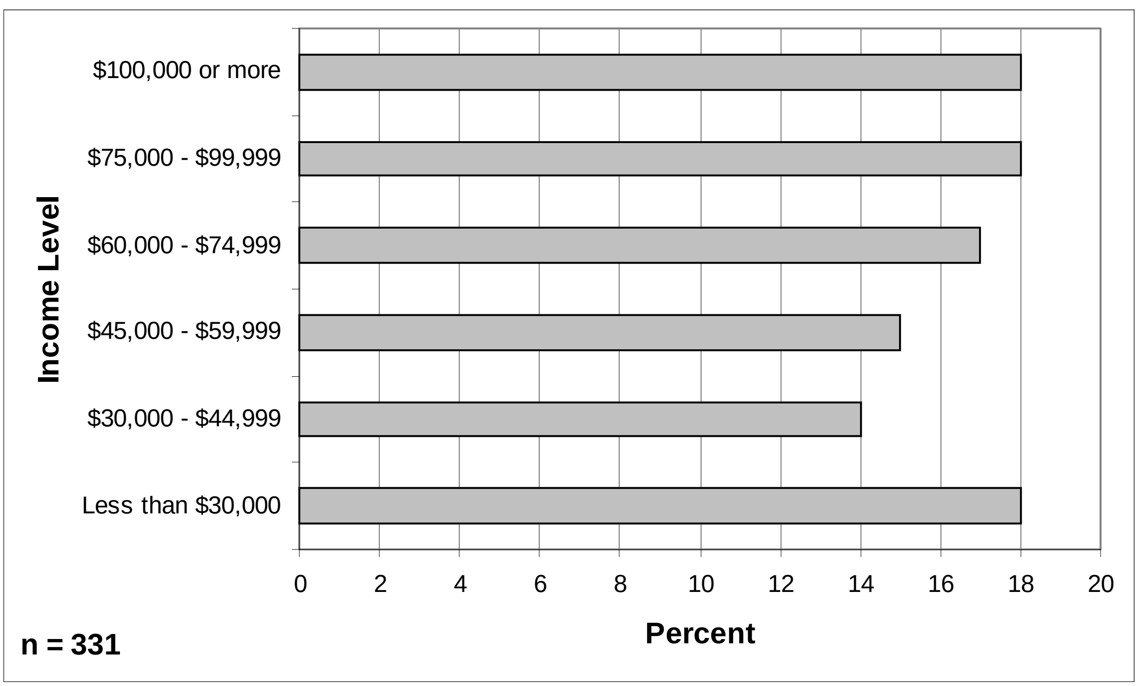
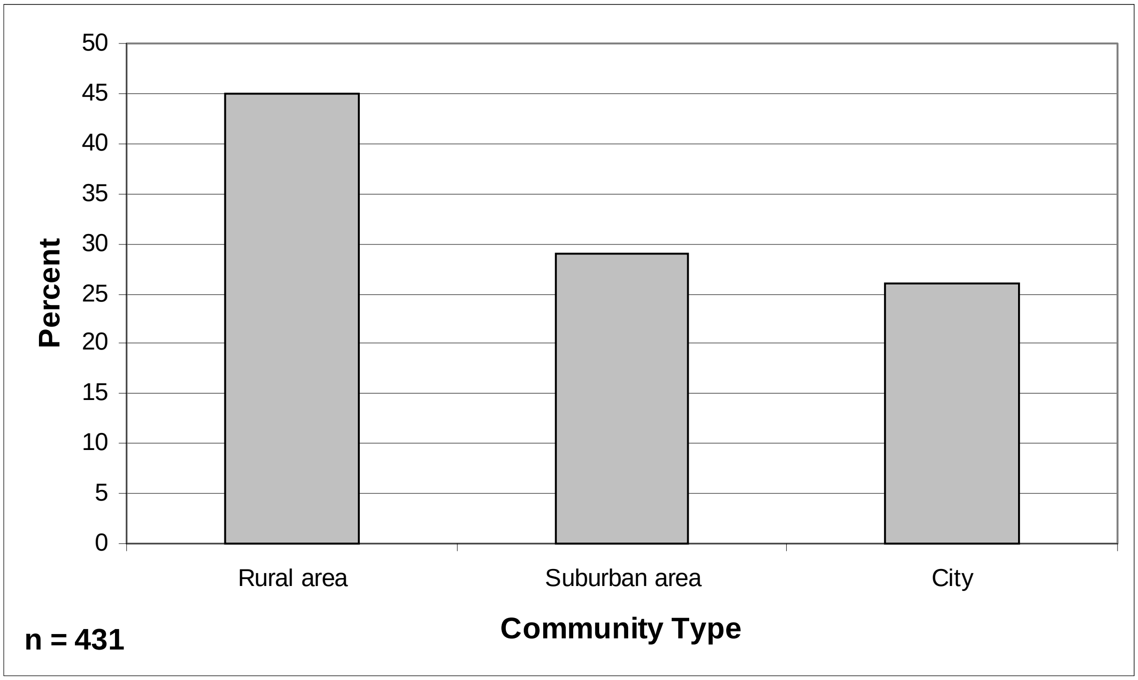
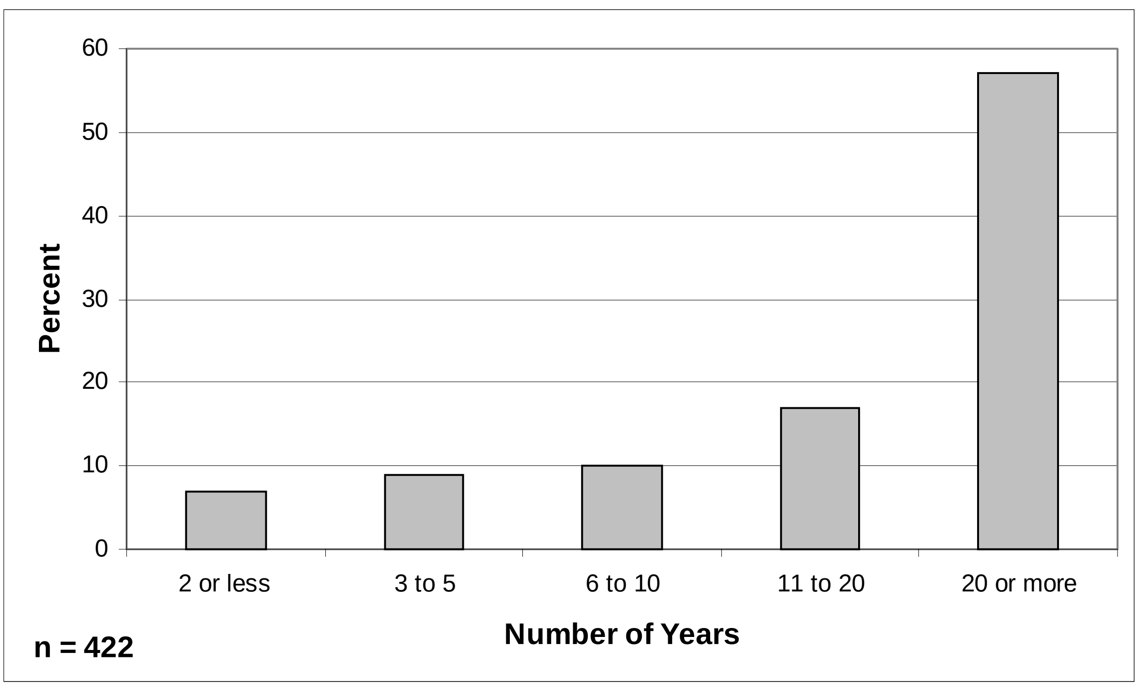


Figure 5. Type of Community Respondent Grew Up In



Almost three-fourths of the respondents grew up either in a rural area or in a suburban area.

Figure 6. Number of Years Respondent Has Lived in New Hampshire



Fifty-seven percent of respondents have lived in the state for at least twenty years.

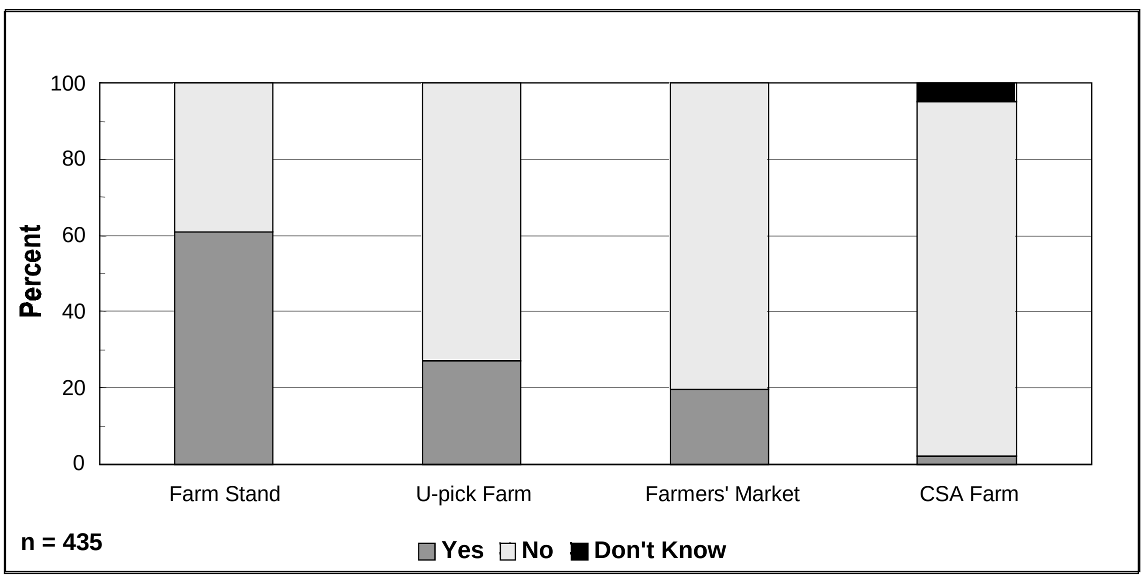
Table 1. In the past three months, where did you most often buy your fresh fruits and vegetables?

Market (n = 435)	Percent
Supermarket or grocery store	84.6
Farm or farm stand	11.0
Farmers' market	3.7
Own or friend's garden	2.3
Food cooperative	1.8
Other	1.8

Supermarkets and grocery stores were the most common places respondents purchased their fresh fruits and vegetables. Nearly 15 percent of respondents identified farms and farmers' markets as principal sources of fresh fruits and vegetables during the summer months. The sum of responses exceeds 100 percent because some respondents identified more than one source.

Behavior and Attitudes Toward Buying Directly from Farmers

Figure 7. Did you buy products from a (farm stand, U-pick farm, farmers' market, CSA farm) in the last three months?



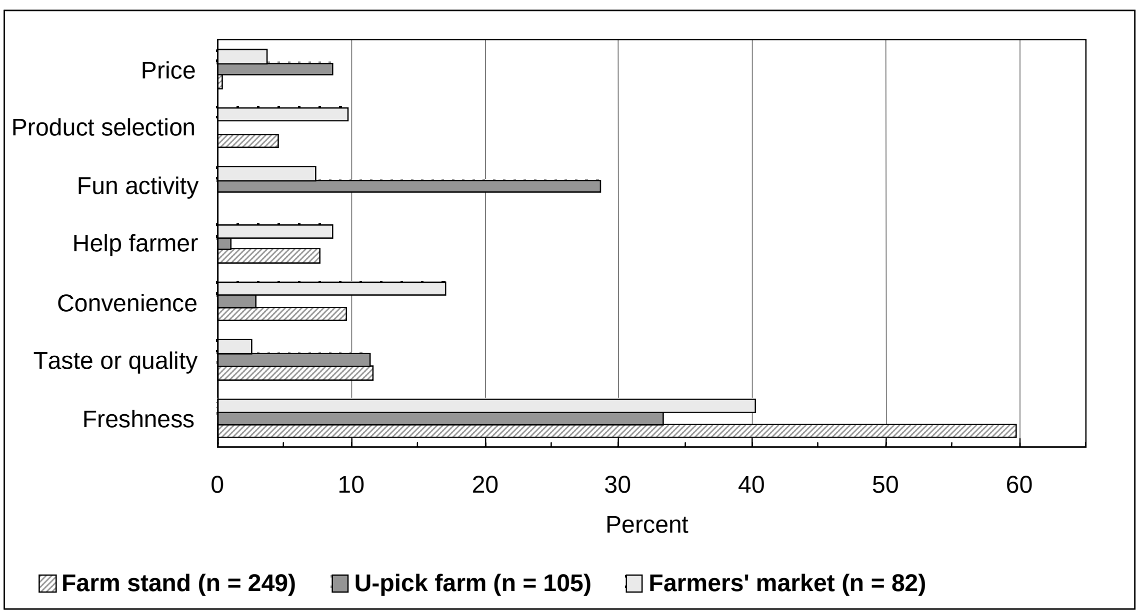
Sixty percent had purchased products from a farm stand in the last three months, 27 percent from a U-pick farm, and 20 percent from a farmers' market. Very few respondents, less than two percent, had recently purchased products from a CSA farm. In fact, five percent of respondents didn't know if they made a purchase at a CSA farm. A related question asked if products CSA customers purchased were already picked or if they picked their own. All respondents indicated the products bought were already picked.

Table 2. What were the reasons you bought at a (farm stand, U-pick farm, farmers' market)?

Market	Farm Stand (n = 263)	U-pick Farm (n = 118)	Farmers' Market (n = 85)
	Percent	Percent	Percent
Convenience	22	8	29
Value for the money	4	16	7
Freshness of products	73	51	49
Taste of products	12	19	10
Products more nutritious	>1	1	11
Products safer	2	0	9
Good selection	9	5	20
Atmosphere	1	40	10
Special event or promotion	0	3	>1
Help local farmer	17	7	24
Other	3	1	4

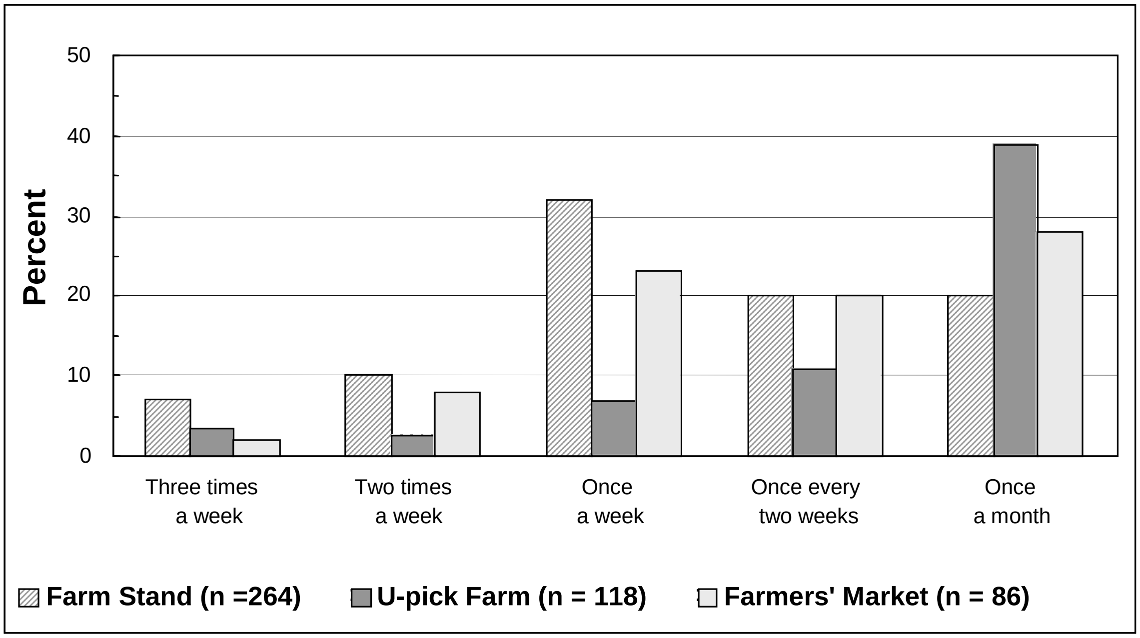
"Freshness of products" ranked as the top reason for buying products in all three markets. "Convenience" and "help local farmer" were important reasons for customers of farm stands and farmers' markets. "Atmosphere" ranked very high for U-pick customers.

Figure 8. Of all the reasons you bought at a (farm stand, U-pick farm, farmers' market), which one is the most important reason?



Product freshness was the most important reason cited by respondents for their purchases at all three markets. Fun activity became the second most important reason at U-pick farms, convenience for farmers' markets, and taste/quality for farm stands.

Figure 9. On average, how often did you buy products from a (farm stand, U-pick farm, farmers' market) in the last three months?



Customers visited farm stands more frequently than the other two markets. The three top responses for farm stands and farmers' markets were "once a week", "once every two weeks" and "once a month." Nearly 40 percent of U-pick customers bought products not more frequently than "once a month". Thirty eight percent of U-pick customers, 19 percent of farmers' market customers and 11 percent of farm stand customers answered "other" or "don't know" to this question.

Figure. 10 How many different (farm stands, U-pick farms, farmers' markets) did you visit in the last three months?

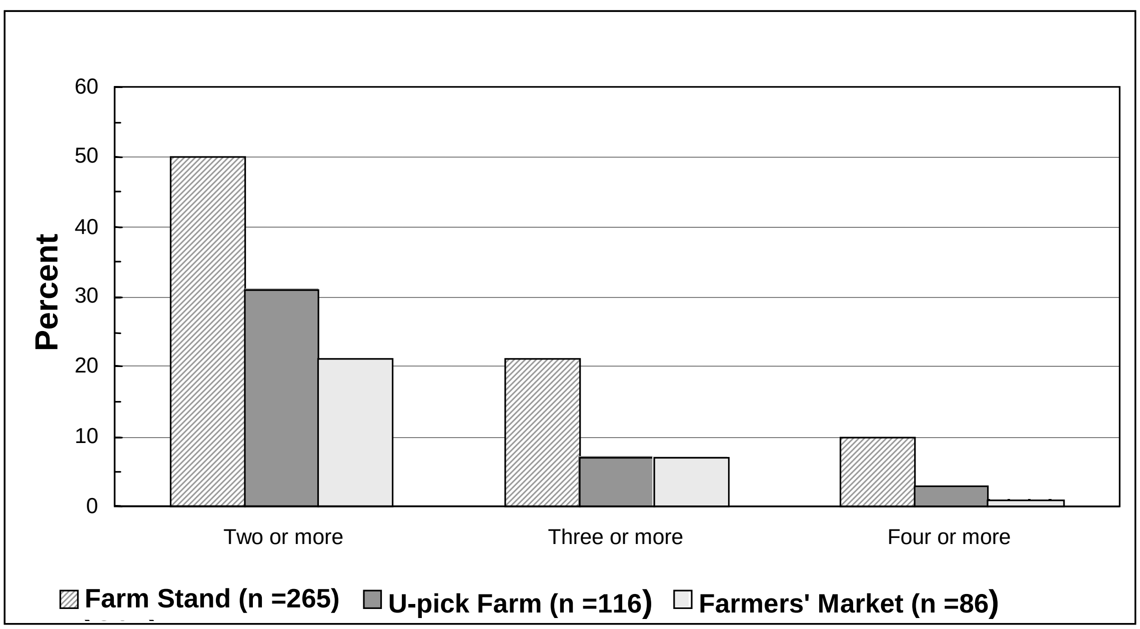
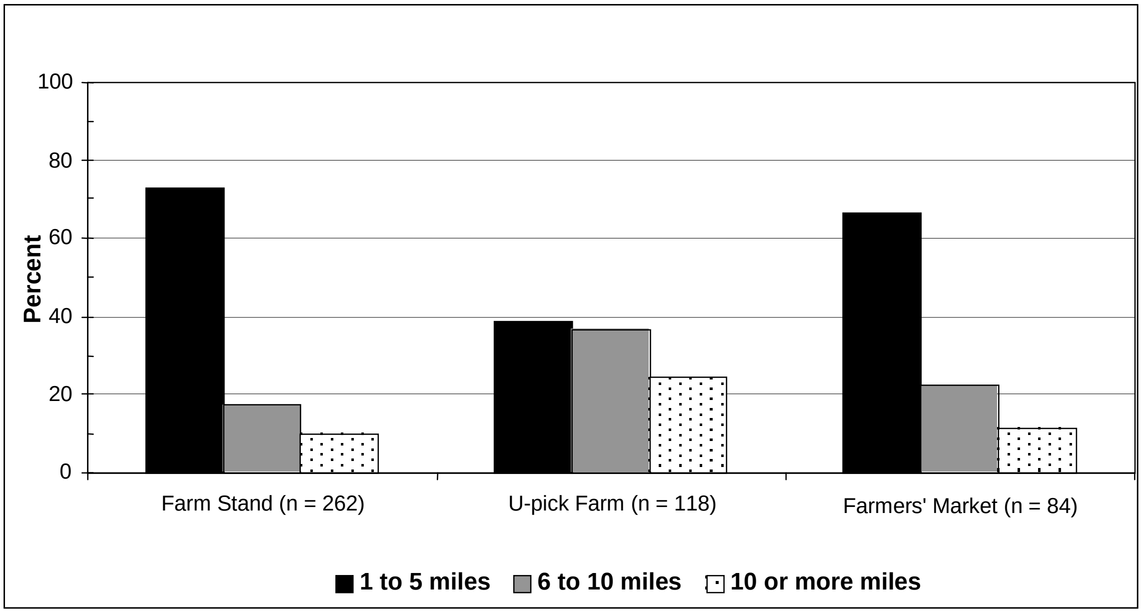


Figure 11. How many miles from your home is the (farm stand, U-pick farm, farmers' market) that you most frequently shopped at in the last three months?



Seventy-three percent of farm stand customers traveled five miles or fewer to the stand they shopped at most frequently, compared to 67 percent of farmers' market customers and 39 percent of U-pick customers. Ninety percent of farm stand customers traveled 10 miles or fewer to the stand they shopped at most frequently, compared to 89 percent of farmers' market customers and 76 percent of U-pick customers.

Table 3. What were the products you bought from a (farm stand, U-pick farm, farmers' market) in the last three months?

Market	Farm Stand (n = 265)	U-pick Farm (n = 118)	Farmers' Market (n = 85)
	Percent	Percent	Percent
Apples	8	21	5
Berries	16		6
Strawberries		63	
Blueberries		51	
Raspberries		15	
Sweet corn	71		40
Tomatoes	57		46
Other vegetables	69		60
Other fruits	22		23
Eggs	>1		3
Cheese	0		5
Honey	>1		3
Jams and jellies	>1		6
Baked goods	4		24
Other	8	14	33

Sweet corn, tomatoes and other vegetables were the top purchases made at farm stands and farmers' markets. Other fruit and berries were also common products purchased at farm stands. Purchases by farmers' market customers showed a large percent of other products as well as baked goods and other vegetables. Strawberries and blueberries were the two principal products bought at U-pick farms. (Note: Apples and pumpkins may have shown a higher percent of U-pick sales if the survey had been conducted at a later date.)

Table 4. What other products, food or otherwise, would you like to be sold at (farm stand, U-pick farm, farmers' market)?

Market	Farm Stand (n = 251)	U-pick Farm (n = 106)	Farmers' Market (n = 84)
	Percent	Percent	Percent
None, don't know, not sure	56	53	56
Bread, baked goods	11	5	11
Other vegetables	13	18	10
Other fruit	7	19	8
Flowers, plants	4	2	2
Cheese, milk, dairy products	4	2	5
NH or local products	2	2	4
Other	14	10	18

The majority of customers seemed to be satisfied with the selection offered at the three markets. Baked goods and wider selection of vegetables and fruit might improve sales at farm stands and farmers' markets. Other fruits and vegetables were also products desired by U-pick customers.

Table 5. What other facilities or services would you like to see at (farm stand, U-pick farm, farmers' market)?

Market	Farm Stand (n = 247)	U-pick Farm (n = 104)	Farmers' Market (n = 83)
	Percent	Percent	Percent
Nothing, don't know	77	66	77
Payment alternative	2	0	4
Restrooms, faucets	1	11	2
Complimentary products	14	9	6
Educational information	2	3	5
Other	7	13	9

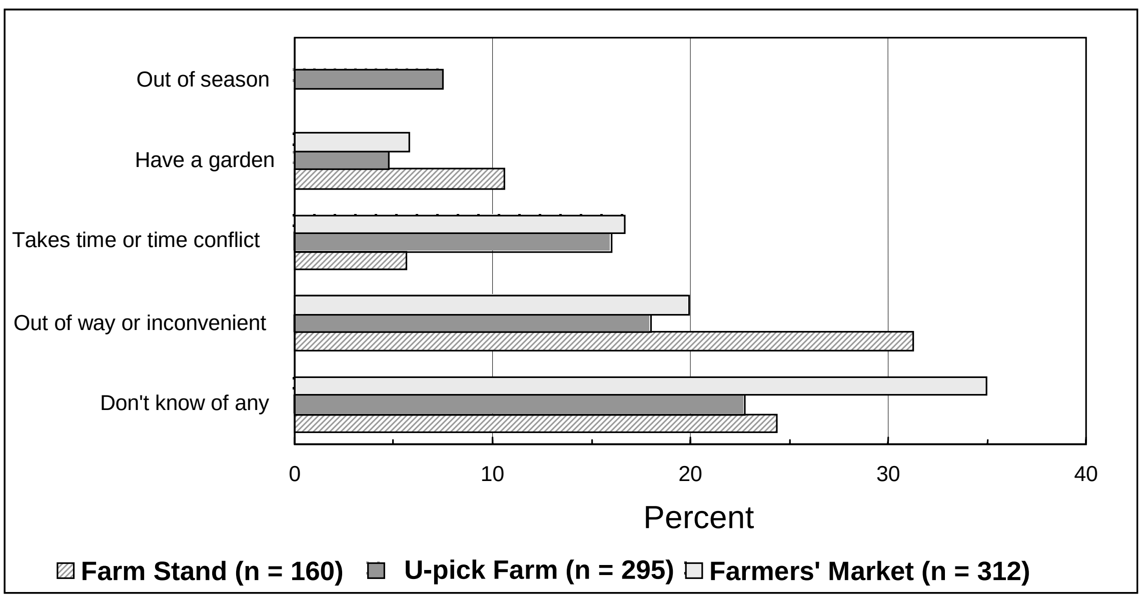
For the most part, customers of all three markets were satisfied with the facilities and services offered at each market. Fourteen percent of farm stand customers would like to see additional or related products offered for sale. Eleven percent of U-pick customers desired restroom facilities.

Table 6. Why did you not shop at a (farm stand, U-pick farm, farmers' market) in the last three months?

Market	Farm Stand (n = 171)	U-pick Farm (n = 317)	Farmers' Market (n = 348)
	Percent	Percent	Percent
High prices	3	>1	>1
Poor quality	>1	0	>1
Limited selection	2	7	1
Out of the way	44	33	39
Don't know any	19	18	33
Don't accept credit cards	1	>1	0
Limited hours	4	8	10
Have own garden	10	5	6
Other	15	27	13
None of the above	3	6	1
Don't know	3	5	6

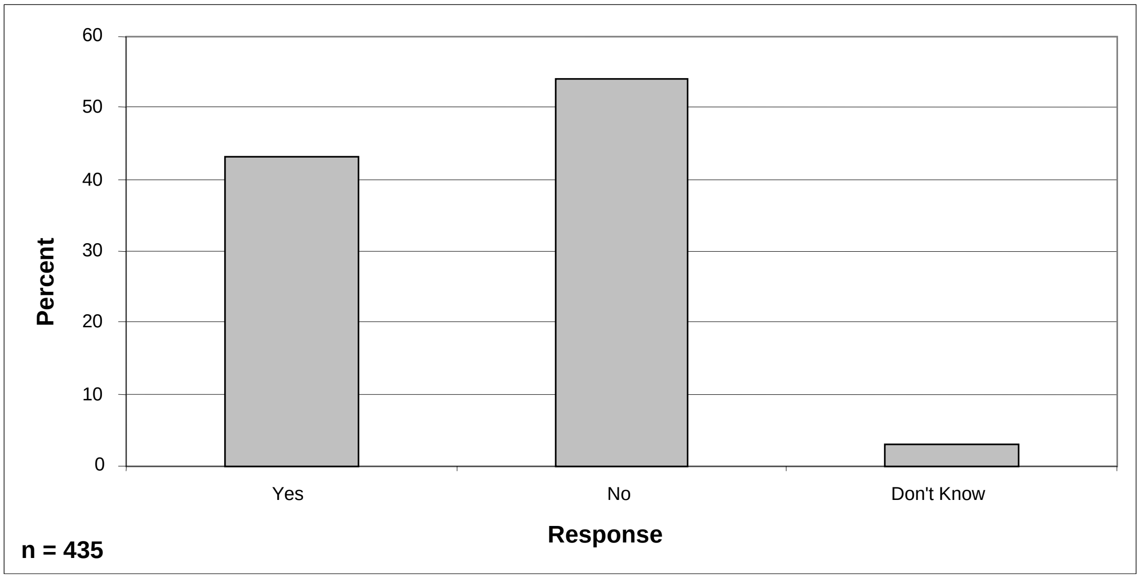
"Out of the way" was the number one reason for not shopping at farm stands, U-pick farms and farmers' markets. "Don't know any" was the second biggest reason for not shopping at farm stands and farmers' markets.

Figure 12. Of all the reasons you did not buy from a (farm stand, U-pick farm, farmers' market), which one is the most important?



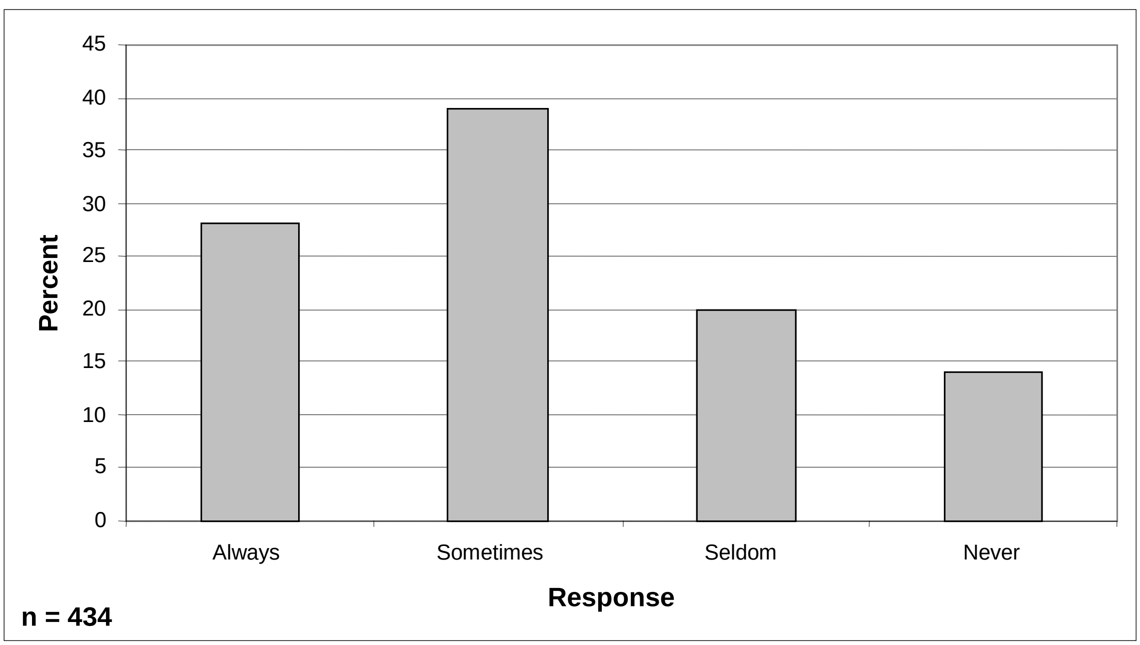
"Don't know any" was the most frequently cited most important reason for respondents not shopping at farmers' markets and U-pick farms and the number two reason for not shopping at farm stands. "Out of the way" or "inconvenient" was the number one reason for not shopping at farm stands and the number two reason for U-pick farms and farmers' markets.

Figure 13. Does the place of origin affect your decision whether or not to buy fresh produce and processed food?



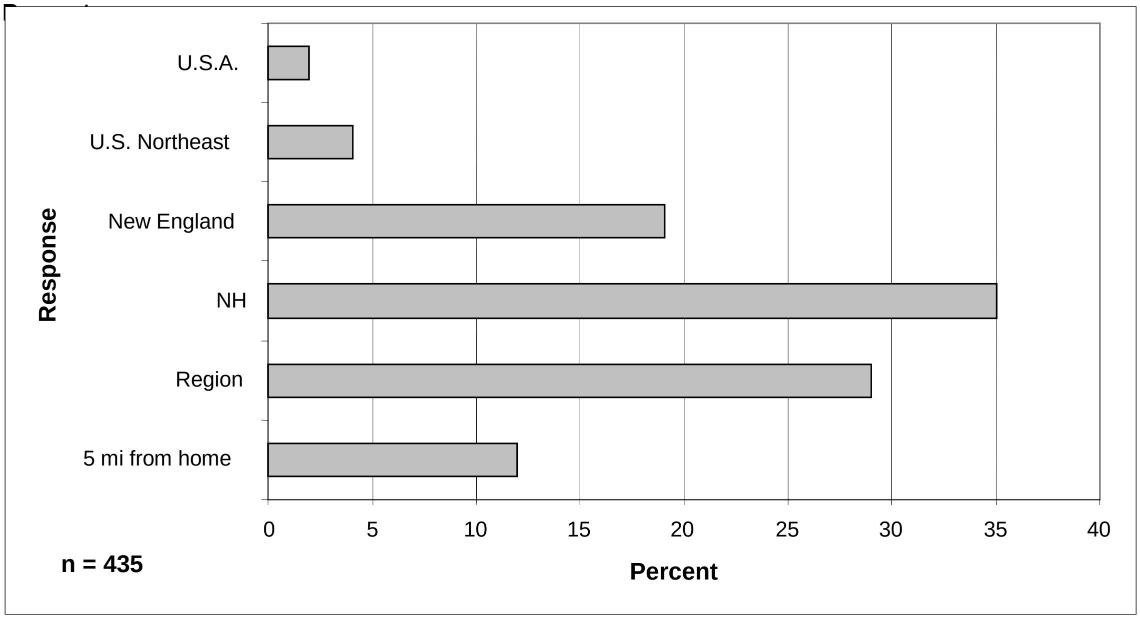
Fifty-four percent of respondents said that the place of origin did not affect their decision to buy fresh produce and processed foods; 43 percent said that it had an effect.

Figure 14. On average, how often do you look at information on store produce and processed foods that tells you where they were grown or made?



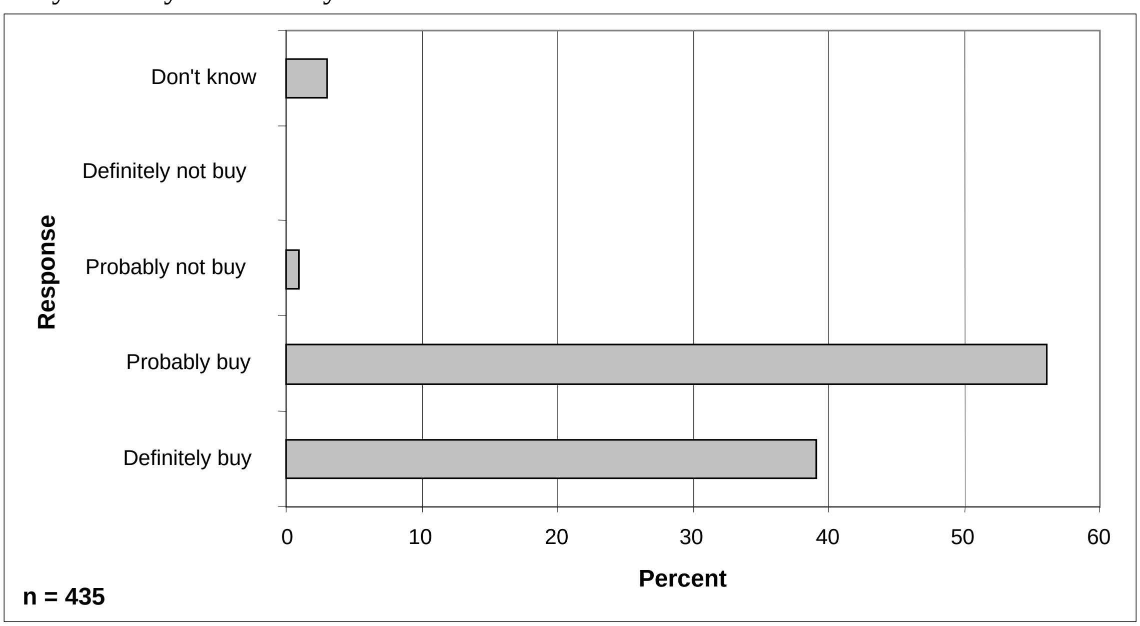
Thirty-nine percent of respondents reported that they sometimes looked at information as to where produce or processed foods were grown or made. Twenty-eight percent said that they always looked for such information.

Figure 15. Which of the following best describes "locally grown"?



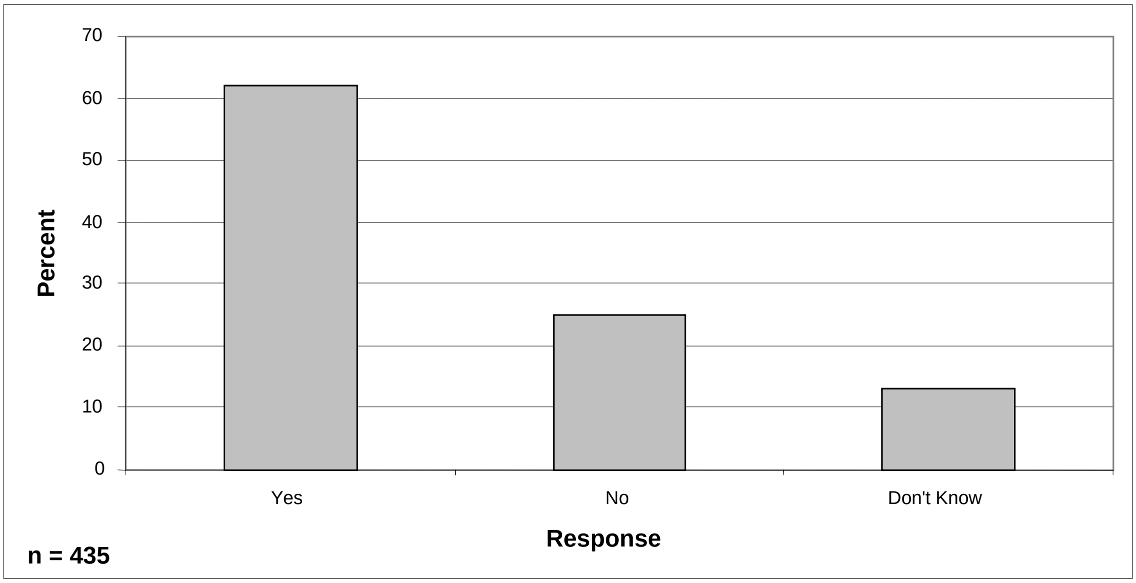
The greatest percentage (35 percent) indicated that "locally grown" meant grown in New Hampshire; 29 percent reported that the term referred to their region in the state.

Figure 16. If New Hampshire produce and food products were labeled as such, how likely would you be to buy them instead of those from other sources?



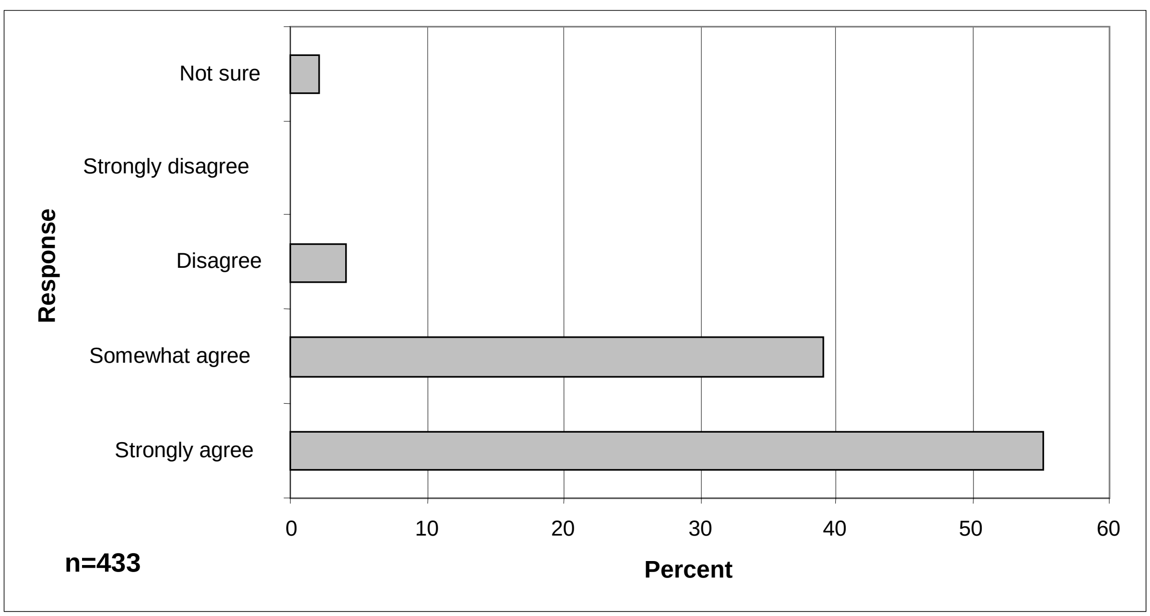
Fifty-six percent of respondents said that they would probably buy NH produce and food products if they were labeled as such. Thirty-nine percent responded that they would definitely buy such products.

Figure 17. Would you be willing to pay more for New Hampshire produce and food products if they were labeled as such?



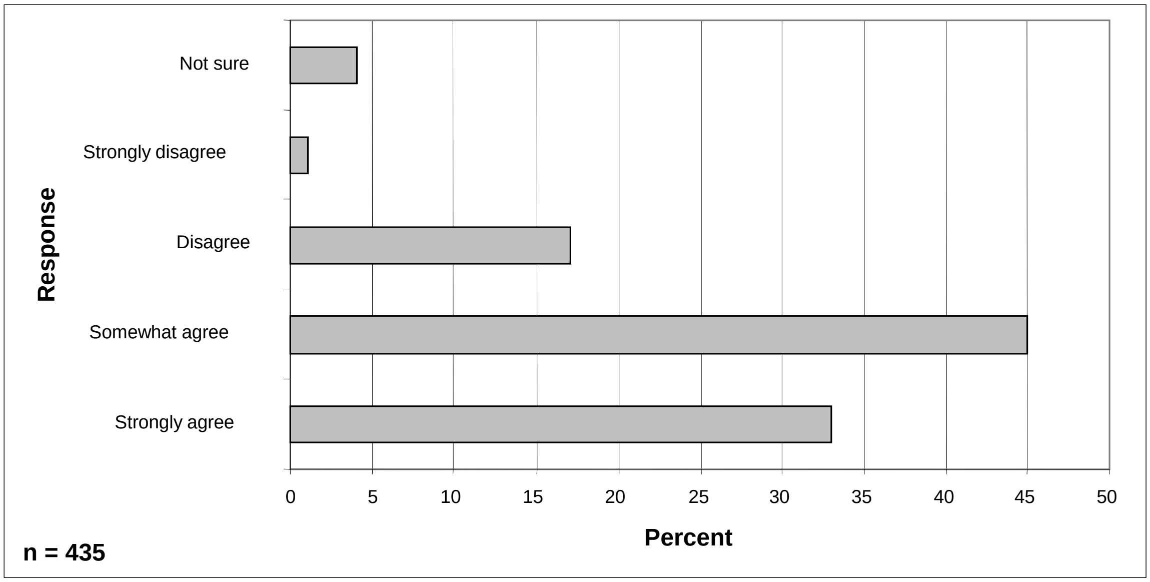
Sixty-two percent of respondents said that they would be willing to pay more for NH produce and food products if they were labeled as such.

Figure 18. "Consumers should have more locally–grown fruits and vegetables available to them."



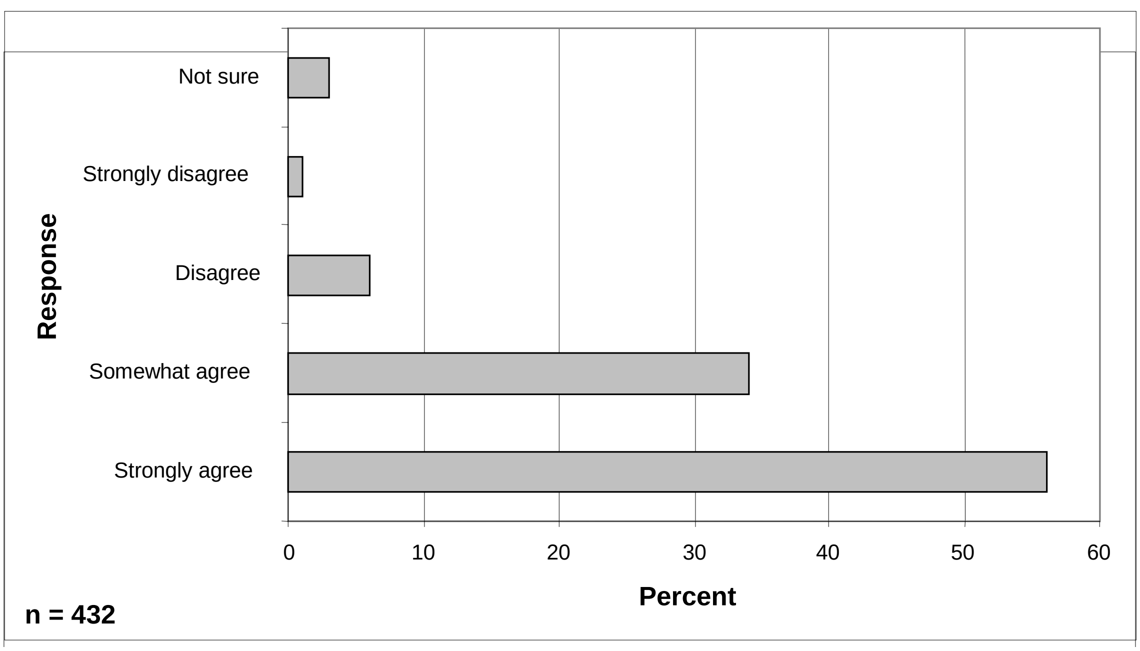
Fifty-five percent of respondents strongly agreed and 39 percent somewhat agreed with the statement that consumers should have more locally-grown fruits and vegetables available to them.

Figure 19. “Consumers can influence what fruits and vegetables are grown locally.”



Forty-five percent somewhat agreed with the statement that consumers can influence what fruits and vegetables are grown locally; 33 percent strongly agreed with the statement.

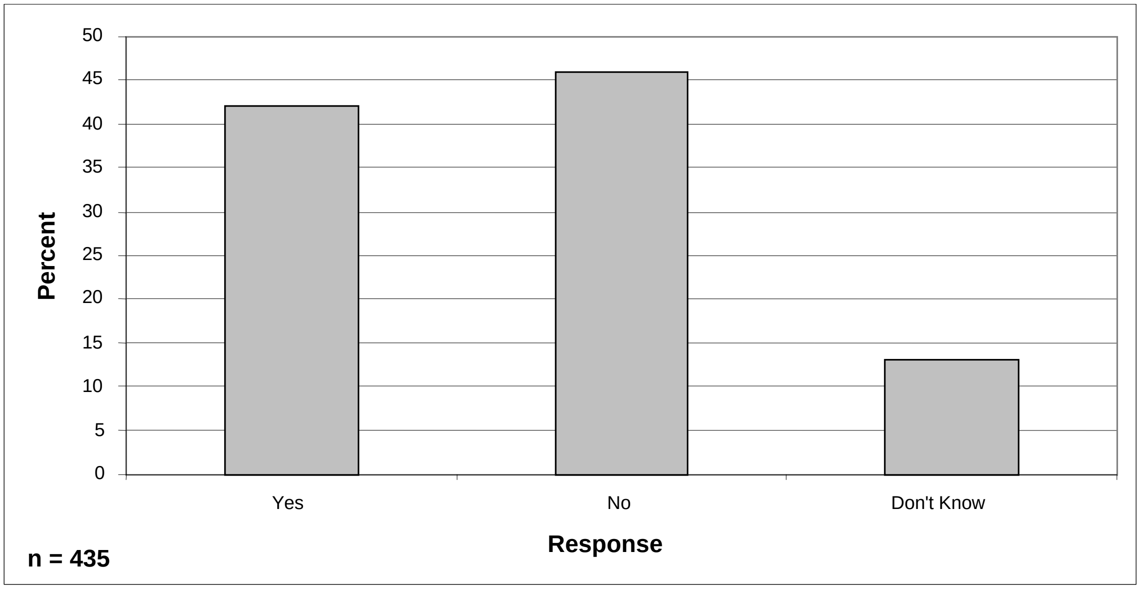
Figure 20. “Cafeterias in schools, hospitals and other public institutions should serve food grown by local farmers.”



Fifty-six percent of respondents agreed strongly with the statement that cafeterias in public institutions should serve food grown by local farmers. Thirty-four percent agreed somewhat.

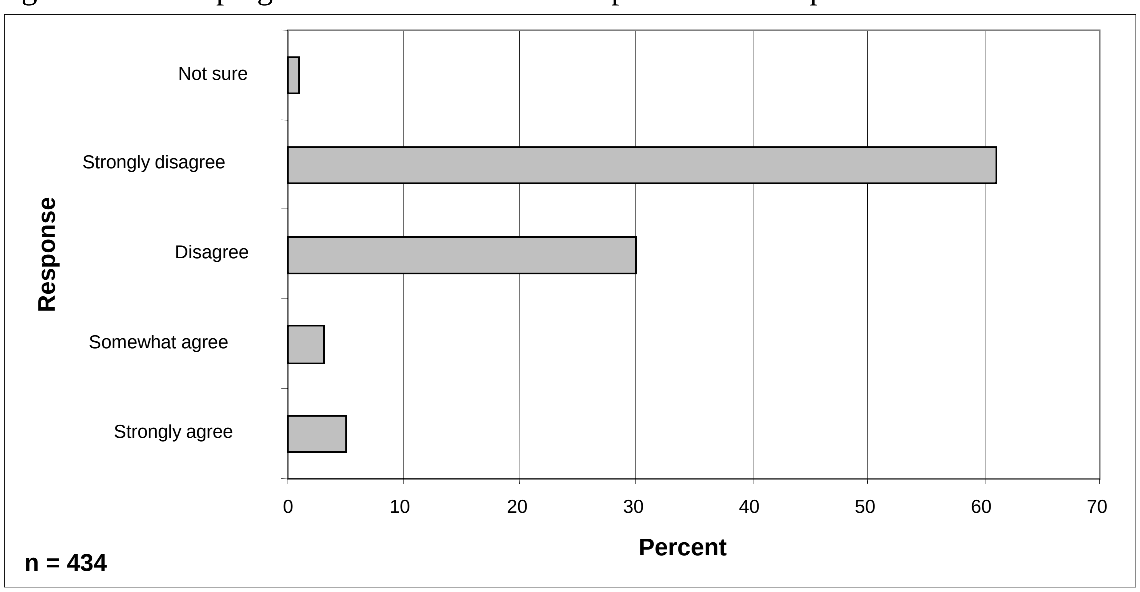
Attitudes Toward Farms and Loss of Farmland

Figure 21. Is loss of open space such as farmland and woodlots a problem in the New Hampshire region where you live?



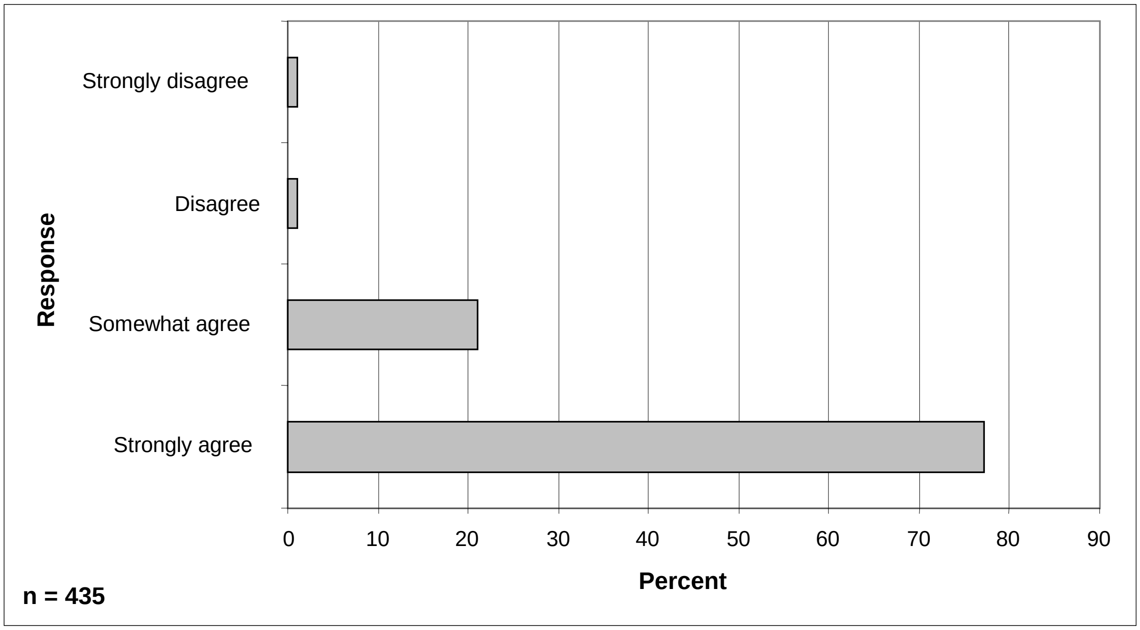
Forty-six percent of respondents said that loss of open space was not a problem in the region where they live. Forty-two percent said that it was a problem.

Figure 22. "Keeping farms viable in New Hampshire is not important."



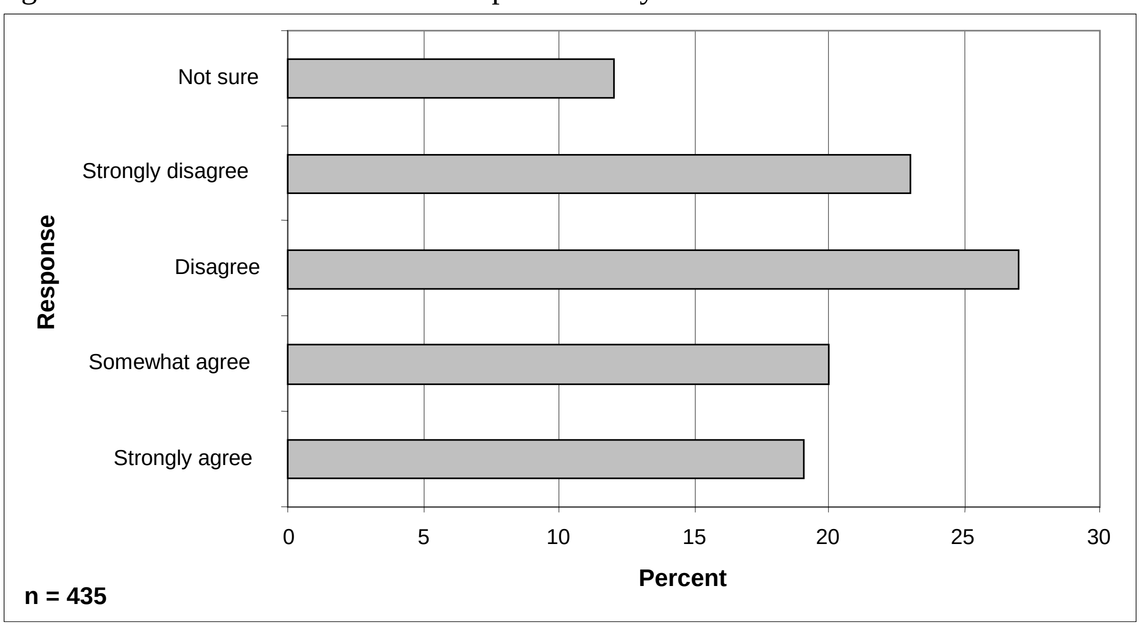
Sixty-one percent of respondents strongly disagreed with the statement that keeping farms in New Hampshire viable is not important. Thirty percent disagreed with the statement.

Figure 23. “Buying local produce is an effective way to keep New Hampshire farms viable.”



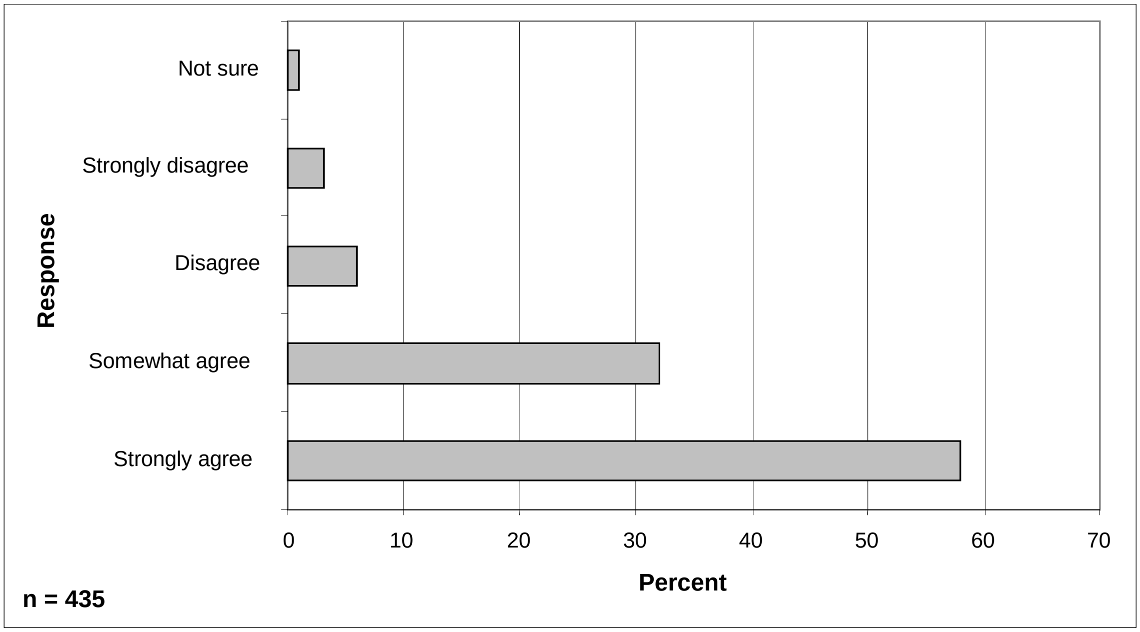
Seventy-seven percent of respondents strongly agreed with the statement that buying local produce is an effective way to keep NH farms viable. Twenty-one percent indicated that they somewhat agreed with the statement.

Figure 24. “Loss of farmland is not a problem in your town.”



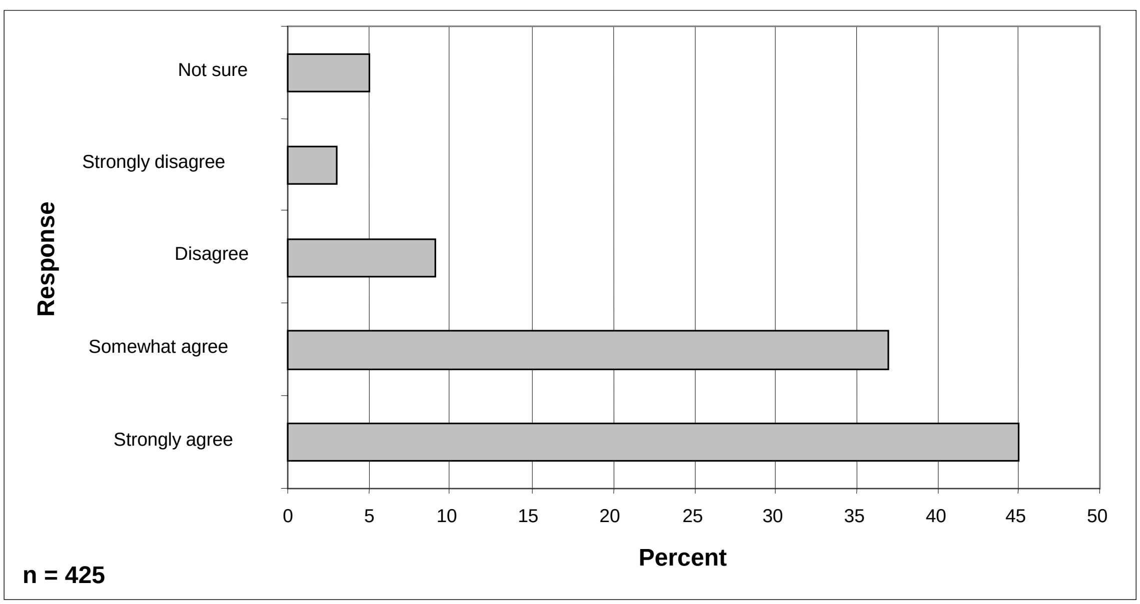
Half of the respondents either disagreed (27 percent) or strongly disagreed (23 percent) with the statement that loss of farmland is not a problem in their town. Thirty-nine percent either agreed somewhat or agreed strongly with the statement.

Figure 25. “Laws should try to protect farmland from urban development.”



Fifty-eight percent agreed strongly and 32 percent agreed somewhat with the statement that laws should try to protect farmland from urban development.

Figure 26. “I support the idea that a portion of my property taxes be used to preserve open space in my town.”



Forty-five percent agreed strongly and 37 percent agreed somewhat with the idea that a portion of their property tax be used to preserve open space in their town.

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